



Test your knowledge – Officer financial training

The Northern Branch of BCD employee association has recently had an election. Below is information about some of their newly elected officers.

What are the union's obligations in relation to the financial training of their officers under section 293K and section 293M of the *Fair Work (Registered Organisations) Act 2009*?

Brian the Branch secretary



Brian has been newly elected as Branch secretary.

He was previously a Branch committee member.

The term commences on 15 December 2020

Training:

Completed officer financial training in 2016 when a committee member.

Answer: Brian needs to do training or obtain an exemption by 15 June 2021.

If BCD applies for an exemption, his prior experience as an officer of a registered organisation may be a relevant factor for the exemption.

The exemption application should be submitted as early as possible once Brian takes office. This will allow Brian to complete training within 6 months if an exemption is not granted.



Fair Work
Commission

Lily the Branch president



Lily is new to BCD union and has never been an officer of a registered organisation.

Election:

Stage 1 of the election (September)

Elected as Branch committee member
Term of office commences 15 December 2020

Stage 2 of the election (October)

Elected as Branch president
Term of office commences 1 January 2021

Stage 3 of the election (November)

Elected to BCD's National Council
Term of office commences 1 March 2021

Qualifications and previous work experience:

Qualified teacher with 15 years service.

No financial management experience.

Answer: Lily needs to do training or obtain an exemption by 15 June 2021.

She has been elected to three offices (each with financial management duties) and her commencement date for all offices are different.

If Lily wishes to complete the training once for all three offices, she should complete training *after* she has started in all three offices, and *before* the six month expiry date (i.e. between 1 March and 15 June 2021). This will cover her financial responsibilities in all three offices.

If Lily completes training *before* she starts in one or more office, BCD union will need to lodge an exemption application for the offices which start *after* she does the training (or re-complete training).



Maree, Vin, Eric and Nina

Branch committee members



The term for all committee members commences on 15 December 2020

Maree

Re-elected as Branch committee member.

Completed financial training in 2019.

Answer: Maree does not need to do training or get an exemption because she has been re-elected to the same office.

Vin

First time officer of a registered organisation.

Has a finance degree and has been a company director for over 10 years.

Answer: Vin needs to do training or obtain an exemption by 15 June 2021.

His experience as a company director and finance degree may be relevant factors for an exemption.

Eric

Has been elected as Branch committee member again after a two year break.

Previously completed financial training in 2017.

Has 15 years of prior service as a branch committee member of BCD union.

Answer: Eric needs to complete training or obtain an exemption by 15 June 2021.



His prior experience as an officer of a registered organisation may be a relevant factor for an exemption.

Nina

Nina is a first time officer of a registered organisation
She completes financial training on 1 December 2020, in anticipation of her new role.

Answer: Nina should have waited until after she took office (15 December) to complete training.

Because she has completed training before starting in office, Nina either needs to do approved training again or get an exemption.

Esme the Representative to the national conference



Esme has been newly elected as a representative to the national conference.

BCD rules gives national conference representatives some powers to contribute to policy matters, but they exclude financial decision-making.

At the national level of the union, all financial decisions are made by the National Council (the committee of management).

Answer: Esme does not exercise financial duties in her office. She is not obliged to complete financial training.